

Knowledge Transfer Questionnaire
(for use during workforce or succession planning)

Instructions

This questionnaire is designed to help key employees document the kinds of knowledge exchange interactions they participate in in the workplace. Key points of consideration at each step along the way, and with each question, are:

- Who is the interaction with (customers, other staff, stakeholders, etc.)
- Who initiated it
- For what purpose
- What is involved (resources, dynamics, etc.)
- How frequently this kind of interaction occurs
- Is this one typical of this type of interaction? If not, how is it different from the norm?

The questionnaire can be used with a single individual. It can also be used as an group interview or focus group tool.

(See also the Knowledge Transfer Questionnaire for Exiting Employees.)

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Name: _____ **Date:** _____
Dept., Div., or Unit: _____ **Time in current position:** _____

1. What are your current responsibilities (with pending work, action steps, next steps and contacts)?

2. What do you consider to be the 5 most immediate needs in your work or program?

3. What do you consider the ten most important tasks of your job?

4. Who else is able to perform these tasks?

5. Are these tasks documented in a way that someone not familiar with them could perform them based on the documentation? If so, where is that information located?

6. Please list your most important contacts – include why they are important, phone number, email address, mailing address and any notes you feel are important.

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7. Who do you contact for assistance most frequently in order to do your job?

8. What are the most frequent issues or questions people bring to you?

9. Who brings them to you?

10. Which consume the most time?

11. List the resources you use most frequently to obtain information to do your job (be specific).

12. What are the ten most important things you need to know in order to do your job?

13. Who else knows this information?

14. Is this information documented in a way that others could locate and make use of it? If so, where is that information located?